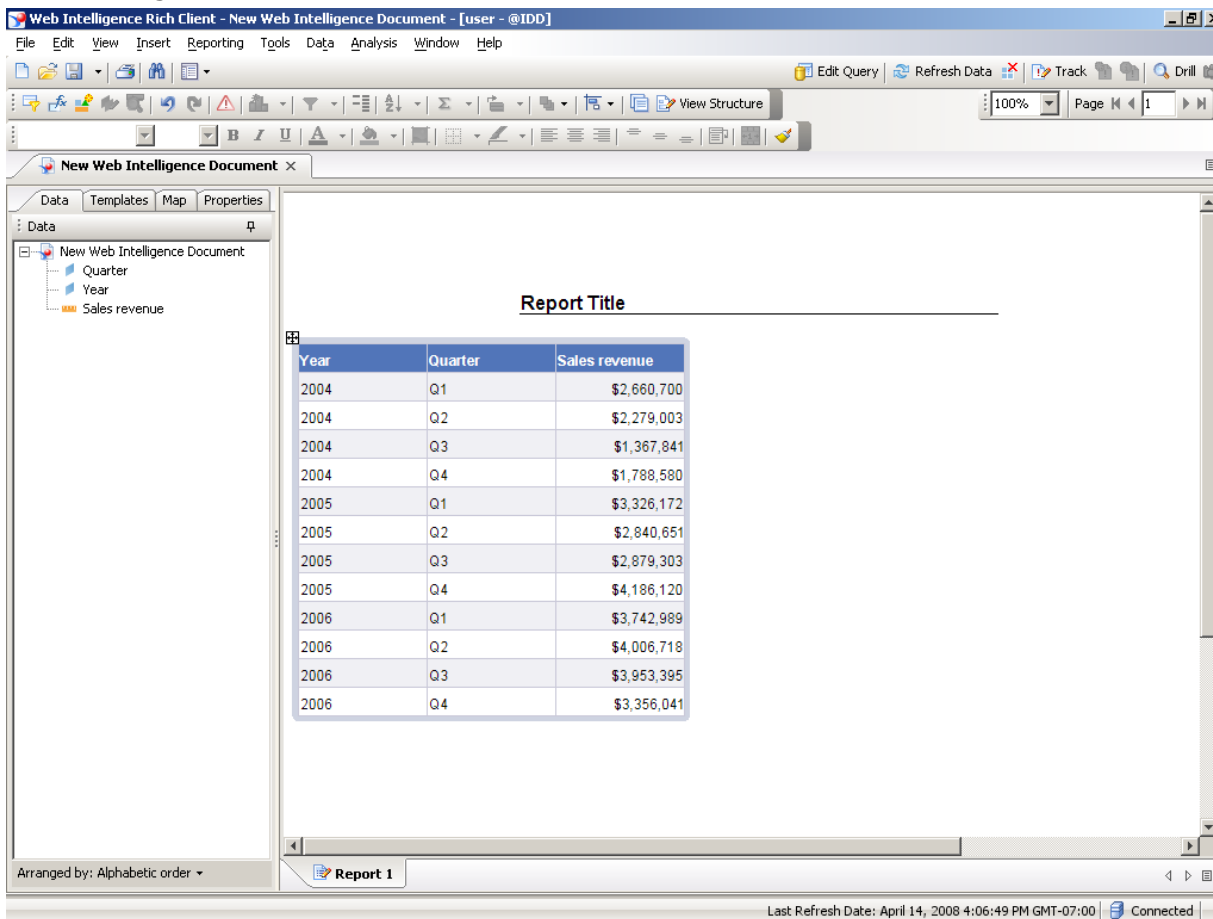


Saving a document

Procedure

1. Start the transaction using the menu path or transaction code.

Web Intelligence Rich Client



The screenshot shows the Web Intelligence Rich Client window titled "New Web Intelligence Document - [user - @IDD]". The interface includes a menu bar (File, Edit, View, Insert, Reporting, Tools, Data, Analysis, Window, Help), a toolbar with various icons, and a sidebar on the left with a tree view showing "Data", "Templates", "Map", and "Properties". The main area displays a report titled "Report Title" with a table of sales revenue data.

Year	Quarter	Sales revenue
2004	Q1	\$2,660,700
2004	Q2	\$2,279,003
2004	Q3	\$1,367,841
2004	Q4	\$1,788,580
2005	Q1	\$3,326,172
2005	Q2	\$2,840,651
2005	Q3	\$2,879,303
2005	Q4	\$4,186,120
2006	Q1	\$3,742,989
2006	Q2	\$4,006,718
2006	Q3	\$3,953,395
2006	Q4	\$3,356,041

The status bar at the bottom indicates "Last Refresh Date: April 14, 2008 4:06:49 PM GMT-07:00" and "Connected".

2. Press [Enter] to continue.

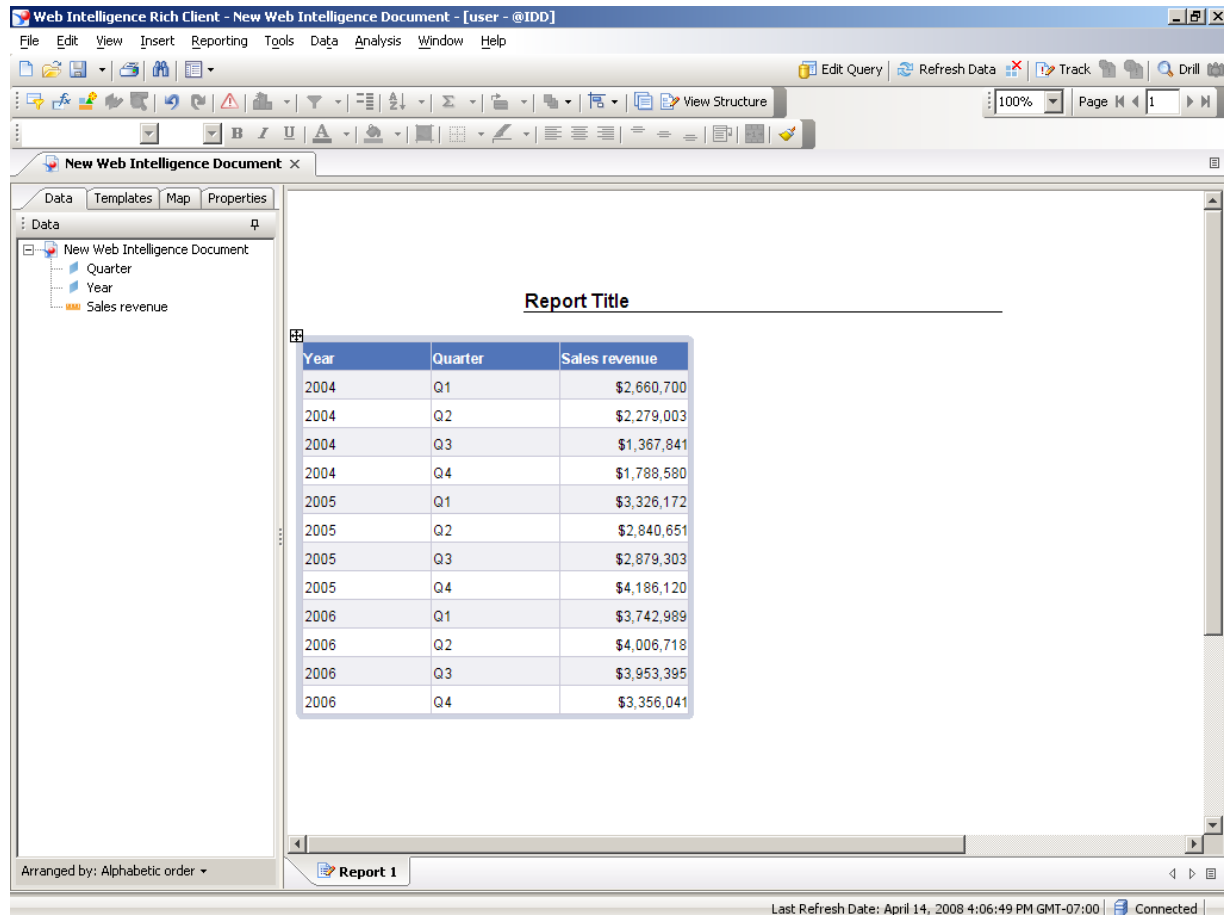
In the Web Intelligence Rich Client, you can save documents to your computer as Web Intelligence files (.wid), Portable Document Format files (PDF), or Excel files.

In this lesson, you will to save a document to your hard drive in both Web Intelligence and PDF file format.

Saving a document

Press **[Enter]** to continue.

Web Intelligence Rich Client



The screenshot shows the Web Intelligence Rich Client interface. The title bar reads 'Web Intelligence Rich Client - New Web Intelligence Document - [user - @IDD]'. The menu bar includes File, Edit, View, Insert, Reporting, Tools, Data, Analysis, Window, and Help. The toolbar contains icons for Edit Query, Refresh Data, Track, Drill, and View Structure. The left pane shows a tree view with 'New Web Intelligence Document' expanded, containing 'Quarter', 'Year', and 'Sales revenue'. The main area displays a report titled 'Report Title' with a table of sales revenue data.

Year	Quarter	Sales revenue
2004	Q1	\$2,660,700
2004	Q2	\$2,279,003
2004	Q3	\$1,367,841
2004	Q4	\$1,788,580
2005	Q1	\$3,326,172
2005	Q2	\$2,840,651
2005	Q3	\$2,879,303
2005	Q4	\$4,186,120
2006	Q1	\$3,742,989
2006	Q2	\$4,006,718
2006	Q3	\$3,953,395
2006	Q4	\$3,356,041

The bottom status bar shows 'Arranged by: Alphabetic order', 'Report 1', 'Last Refresh Date: April 14, 2008 4:06:49 PM GMT-07:00', and 'Connected'.

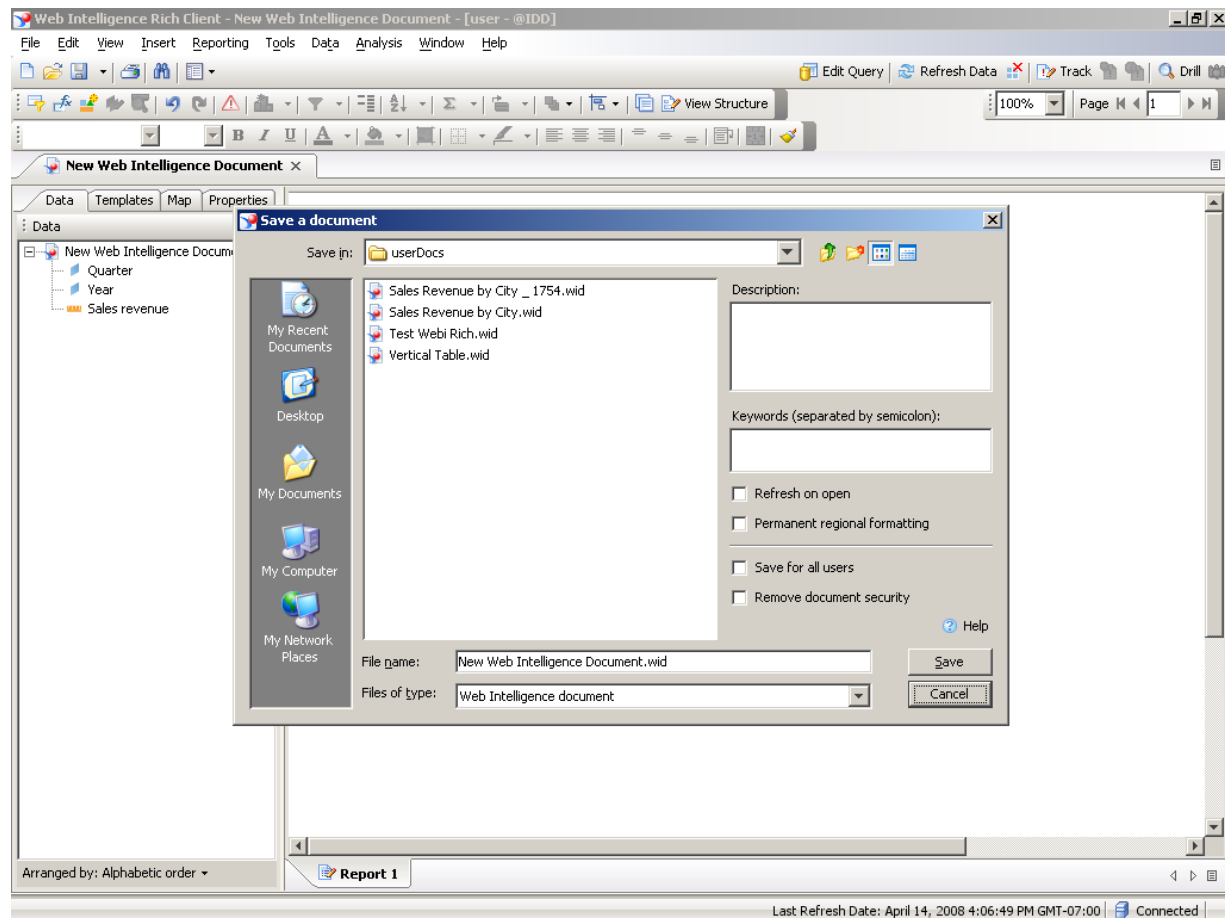
- Click **Save** .

First, save the new document to your computer as a Web Intelligence file.

- Click **Save as....**

Saving a document

Save a document



5. Click in the **File name:** field.

In the Save a document dialog box, the file is called New Web Intelligence Document.wid by default.

In the actual program, to change the name to something more meaningful, you must highlight the file name with your mouse.

6. Press **[Delete]**.

Saving a document

Delete the default file name.

7. As required, complete/review the following fields:

Field	R/O/C	Description
Title:	R	Example: Sales Revenue Report

Enter the new file name into the **File name:** field.

8. Click **Save**.

Saving a document to your Favorites folder and referenced in your My Sales Documents category means that it will be stored in an area on the BusinessObjects server that is reserved for your own use. No other user will be authorized to view this document.

You can now move or copy this document to other folder locations in InfoView if required.

Saving a document

Web Intelligence Rich Client

The screenshot shows the Web Intelligence Rich Client window titled 'Web Intelligence Rich Client - Sales Revenue Report - [user - @IDD]'. The interface includes a menu bar (File, Edit, View, Insert, Reporting, Tools, Data, Analysis, Window, Help), a toolbar with icons for file operations and report management, and a main workspace. On the left, a 'Data' pane shows a hierarchical structure: 'Sales Revenue Report' containing 'Quarter', 'Year', and 'Sales revenue'. The main workspace displays a table titled 'Report Title' with the following data:

Year	Quarter	Sales revenue
2004	Q1	\$2,660,700
2004	Q2	\$2,279,003
2004	Q3	\$1,367,841
2004	Q4	\$1,788,580
2005	Q1	\$3,326,172
2005	Q2	\$2,840,651
2005	Q3	\$2,879,303
2005	Q4	\$4,186,120
2006	Q1	\$3,742,989
2006	Q2	\$4,006,718
2006	Q3	\$3,953,395
2006	Q4	\$3,356,041

At the bottom of the window, a status bar indicates 'Last Refresh Date: April 14, 2008 4:06:49 PM GMT-07:00' and 'Connected'.

9. Press [Enter] to continue.

The document has been saved to your hard drive, and its new file name appears on the document tab.

Press **[Enter]** to continue.

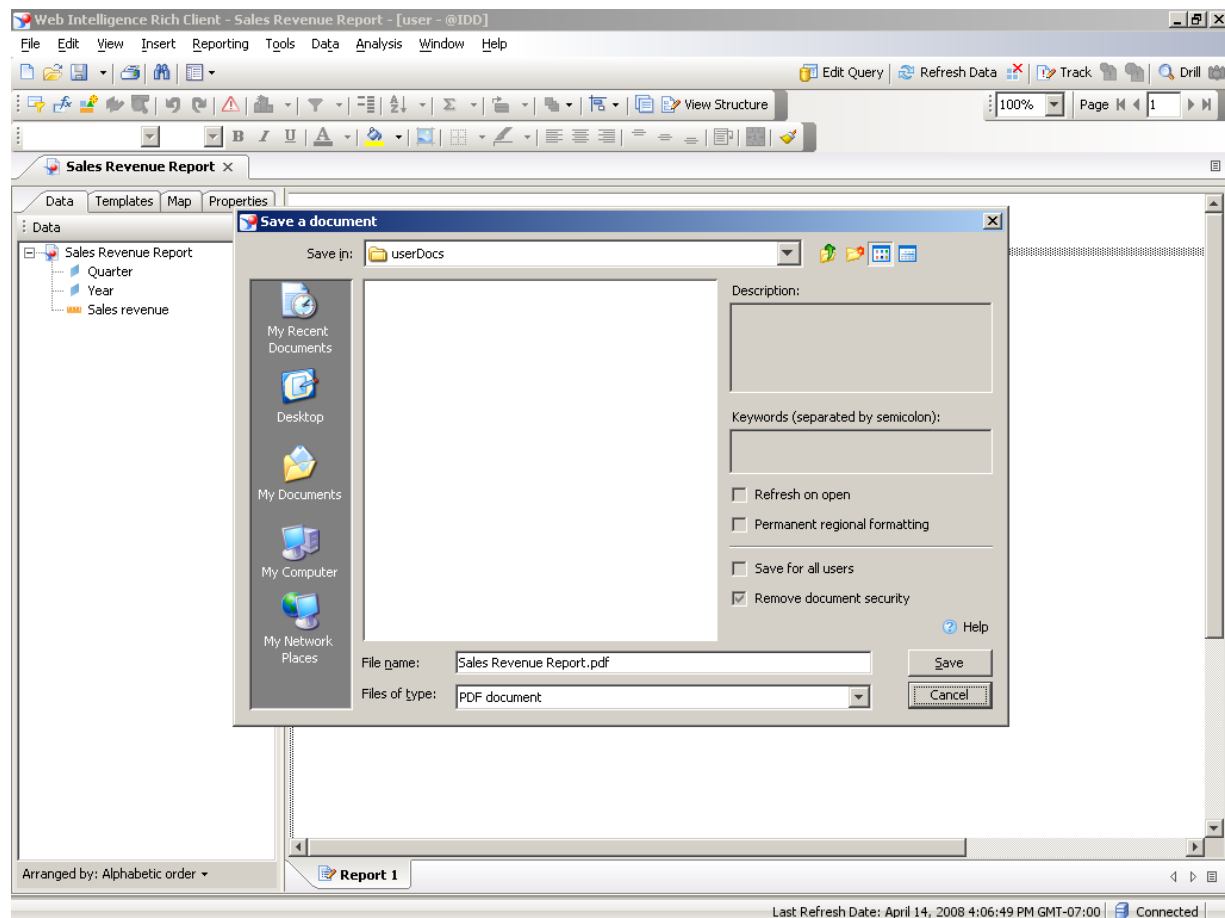
10. Click the arrow beside **Save** .

Now, save this same document as a PDF file.

Saving a document

11. Click **Save to my computer as**.
12. Click **PDF**.

Save a document



13. Click **Save**.

By default, the file will save with the same filename as the Web Intelligence document with a .pdf file extension.

In this case, it will save as Sales Revenue Report.pdf.

Saving a document

Web Intelligence Rich Client

The screenshot shows the Web Intelligence Rich Client interface. The title bar reads 'Web Intelligence Rich Client - Sales Revenue Report - [user - @IDD]'. The menu bar includes File, Edit, View, Insert, Reporting, Tools, Data, Analysis, Window, and Help. The toolbar contains icons for file operations, data manipulation, and report navigation. The main window displays a report titled 'Sales Revenue Report' with a table of sales revenue data. The left pane shows a tree view of the report structure, including 'Sales Revenue Report', 'Quarter', 'Year', and 'Sales revenue'. The bottom status bar indicates 'Last Refresh Date: April 14, 2008 4:06:49 PM GMT-07:00' and 'Connected'.

Year	Quarter	Sales revenue
2004	Q1	\$2,660,700
2004	Q2	\$2,279,003
2004	Q3	\$1,367,841
2004	Q4	\$1,788,580
2005	Q1	\$3,326,172
2005	Q2	\$2,840,651
2005	Q3	\$2,879,303
2005	Q4	\$4,186,120
2006	Q1	\$3,742,989
2006	Q2	\$4,006,718
2006	Q3	\$3,953,395
2006	Q4	\$3,356,041

14. Press [Enter] to continue.

Once the PDF is saved, you return to the Web Intelligence Rich Client screen.

Press **[Enter]** to continue.